The Global Automotive OEM Telematics Market is a comprehensive strategy report from Berg Insight analysing the latest developments on the connected car market worldwide.

This strategic research report from Berg Insight provides you with 170 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

**Highlights from this report:**
- **Insights** from numerous executive interviews with market leading companies.
- **New data** on car populations and new car registrations worldwide.
- **Comprehensive overview** of the car OEM telematics value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Detailed profiles** of 17 major car OEMs and their telematics propositions.
- **Market forecasts** by region lasting until 2020.

**Berg Insight’s M2M Research Series**
What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight’s M2M Research Series is a unique series of 20 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

[www.berginsight.com](http://www.berginsight.com)
The installed base of active OEM embedded telematics units to reach 159 million worldwide in 2020

Telematics is a broad term that may be applied to a wide range of automotive connectivity solutions. Berg Insight’s definition of a car telematics system in this report is an automatic system designed for passenger cars that incorporates some form of cellular communication. The history of car telematics can be traced back to the first stolen vehicle tracking systems based on RF communication using unlicensed frequency bands, which appeared on the market in the 1980s. Subsequently mobile networks have enabled true online connectivity with two-way communication at the same time as GPS technology has been commoditised to the extent that satellite positioning can be integrated into virtually any device. Automotive manufacturers can choose between several connectivity options when creating connected car services, which are not mutually exclusive. The main options today are embedded telematics devices, tethered devices and integrated smartphones. With embedded systems the connectivity and intelligence is built into the car. In the case of tethered devices, the connectivity is provided by an external modem or mobile phone while the intelligence is built into the car. Solutions relying on integrated smartphones leverage the connectivity and intelligence built into the smartphone. Car manufacturers often use a combination of these options to support different customer needs and keep pace with the rapid development of mobile technology.

Several categories of car telematics applications are now offered on a commercial basis by most leading car manufacturers. Examples include eCall and roadside assistance, stolen vehicle tracking (SVT), vehicle diagnostics, connected navigation and infotainment, as well as convenience applications. Convenience applications mainly rely on embedded telematics devices to enable remote control of vehicle functions such as door lock/unlock, vehicle preconditioning (heating or cooling of the passenger compartment before a trip) and finding the last parking position. Several other applications also exist, for instance usage-based insurance, leasing and rental fleet management, as well as electronic toll collection and road charging. However, these applications are usually offered by aftermarket service providers.

After many years of development and false starts, telematics has gained momentum and virtually all of the world’s leading car manufacturers have launched mass-market services in key regions.

The drivers behind the adoption of OEM telematics are both commercial and regulatory. Regulatory initiatives related to safety and security will have a decisive effect on the adoption of OEM telematics in Europe and Latin America. The EU’s eCall initiative and Russia’s ERA-GLONASS will make an automatic emergency call device a mandatory safety feature in all newly produced cars. Brazil’s government is pushing car manufacturers to install security tracking devices on all vehicles sold in the country through the so called CONTRAN 245 mandate. In North America, commercial services have driven adoption of OEM telematics services that have evolved from being a differentiator to a mainstream feature offered by most car brands.

Berg Insight estimates that almost 12 percent of all cars sold worldwide in 2013 were equipped with an OEM embedded telematics system. North America is the most advanced market with an attach rate of around 30 percent. Other developed markets such as Europe, Japan and South Korea currently have attach rates of 11–12 percent. China, which has been the world’s largest market for new car sales since 2010, is now also becoming a major market for telematics services with an attach rate of nearly 6 percent in 2013. In other regions, the attach rate is only 1–2 percent. GM and BMW are the leading adopters of embedded telematics, widely offering the technology as a standard feature. GM has been the leading provider of telematics for more than a decade, offering the technology as an integral part of its value proposition in North America and China. Other major car brands offering embedded telematics on a broad scale include Hyundai, PSA, Toyota, Renault and Volvo.

Berg Insight estimates that total shipments of embedded car OEM telematics systems reached 8.4 million units worldwide in 2013. Growing at a compound annual growth rate of 30.6 percent, the shipments are expected to reach 54.5 million units in 2020. The number of telematics subscribers using embedded systems is forecasted to grow at a compound annual growth rate of 38.1 percent from 16.6 million subscribers in 2013 to 158.9 million in 2020. However, by 2020 many users will only have access to safety services such as eCall. Berg Insight forecasts that the number of active subscribers using at least one additional premium telematics service will grow to about 112 million worldwide at the end of 2020.

This report answers the following questions:

- Which are the key OEM telematics applications?
- What is the current status of the car OEM telematics industry?
- How will regulatory developments affect the telematics industry?
- Which are the leading telematics service providers?
- How are mobile operators positioning themselves in the telematics value chain?
- How can smartphones be leveraged for telematics services?
- What telematics offerings are available from the leading car OEMs today?
- What business models are used by car OEMs?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?
1.1 Introduction
1.1.1 Passenger cars in use by region
1.1.2 New passenger car registration trends
1.2 Car manufacturers
1.2.1 Toyota Motor Corporation
1.2.2 Volkswagen Group
1.2.3 General Motors
1.2.4 Renault-Nissan Alliance
1.2.5 Ford Motor Company
1.2.6 Hyundai Motor Group
1.2.7 Fiat Chrysler Automobiles
1.2.8 BMW Group
1.2.9 Honda Motor
1.2.10 Daimler Group
1.3 Overview of car OEM telematics services
1.3.1 Embedded and hybrid telematics systems
1.3.2 Car OEM telematics services in North America
1.3.3 Car OEM telematics services in Europe
1.3.4 Car OEM telematics services in Asia-Pacific
1.4 Regulatory compliance
1.4.1 Vehicle security, safety and emergency call regulations
1.4.2 Vehicle emissions
1.5 Market trends
1.5.1 Hybrid electric, plug-in hybrid electric and all-electric vehicles
1.5.2 Car sharing and personal transportation as a service
1.5.3 ADAS and autonomous driving technologies
2 Car telematics solutions
2.1 Car telematics infrastructure
2.1.1 Vehicle segment
2.1.2 Tracking segment
2.1.3 Network segment
2.1.4 Service segment
2.2 Car telematics applications
2.2.1 eCall and roadside assistance
2.2.2 Stolen vehicle tracking
2.2.3 Motor insurance telematics
2.2.4 Vehicle diagnostics and maintenance
2.2.5 Leasing and rental fleet management
2.2.6 Electronic toll collection and congestion charging
2.2.7 Remote control and convenience services
2.2.8 Connected navigation and infotainment
2.2.9 Wi-Fi hotspot
2.3 Connectivity options
2.3.1 Tethered devices
2.3.2 Integrated smartphone solutions
2.3.3 Embedded connectivity solutions
2.3.4 SIM solutions and embedded UICC
3 OEM telematics propositions
3.1 BMW
3.1.1 Overview of BMW group passenger car models
3.1.2 BMW ConnectedDrive infotainment and mobility services
3.1.3 The MINI Connected smartphone integration system
3.2 Daimler Group
3.2.1 Overview of Mercedes-Benz passenger car models
3.2.2 The COMAND Online infotainment system
3.2.3 Mercedes-Benz connected services
3.2.4 COMAND Online and Connect Me services in Europe
3.3 Fiat Chrysler Automobiles
3.3.1 Overview of Fiat Chrysler Automobiles passenger car models
3.3.2 The Uconnect infotainment systems
3.3.3 Uconnect Access connected services
3.4 Ford Motor Company
3.4.1 Overview of Ford passenger car models
3.4.2 The Ford SYNC infotainment system
3.4.3 Ford SYNC connected services
3.5 General Motors
3.5.1 Overview of the main GM passenger car brands
3.5.2 GM OnStar telematics services
3.5.3 Connected infotainment systems and apps
3.6 Honda Motor Company
3.6.1 Overview of Honda and Acura passenger car models
3.6.2 Overview of Honda and Acura telematics solutions
3.6.3 The HondaLink in-car connectivity system
3.6.4 The AcuraLink connected car systems and services
3.7 Hyundai Motor Group
3.7.1 Overview of Hyundai and Kia passenger car models
3.7.2 Overview of the Hyundai Motor Group’s telematics solutions
3.7.3 The Hyundai Blue Link telematics service in the US
3.7.4 The Kia UVO infotainment system and UVO telematics services
3.8 Jaguar Land Rover Automotive
3.8.1 Overview of Jaguar Land Rover passenger car models
3.8.2 Jaguar Land Rover InControl telematics and smartphone integration services
3.9 Mazda Motor Corporation
3.9.1 Overview of Mazda passenger car models
3.9.2 Mazda telematics and connected navigation services
3.9.3 The Mazda Connect smartphone connectivity platform
3.10 Nissan Motor Company
3.10.1 Overview of Nissan and Infiniti passenger car models
3.10.2 The Nissan CARWINGS telematics service
3.10.3 The Infiniti Connection connected car services
3.10.4 The NissanConnect and Infiniti InTouch connected infotainment systems
3.11 PSA Peugeot Citroën
3.11.1 Overview of Peugeot and Citroën passenger car models
3.11.2 PSA Peugeot Citroën telematics services
3.12 Renault Group
3.12.1 Overview of Renault and Dacia passenger car models
3.12.2 The Carminat TomTom and Renault R-Link connected infotainment systems
3.13 Subaru
3.13.1 Overview of Subaru passenger car models
3.13.2 The Subaru STARLINK infotainment and smartphone connectivity system
3.13.3 G-BOOK telematics services in Japan
3.14 Tesla Motors
3.14.1 Overview of Tesla passenger car models
3.15 Toyota Motor Corporation
3.15.1 Overview of Toyota and Lexus passenger car models
3.15.2 Overview of Toyota and Lexus telematics services
3.15.3 New T-Connect and G-LINK telematics services for the Japanese market
3.15.4 Entune/Enform and Safety Connect telematics services for North America
3.15.5 The Toyota T-Connect telematics services in the Middle East
3.15.6 Toyota and Lexus connected infotainment systems in Europe
3.16 Volkswagen Group
3.16.1 Overview of Volkswagen Group passenger car brands and models
3.16.2 The Audi Connect telematics service
3.16.3 The Porsche Car Connect telematics service
3.16.4 The Volkswagen Car-Net telematics services
3.17 Volvo Car Group
3.17.1 Overview of Volvo passenger car models
3.17.2 The Volvo On Call telematics service
3.17.3 The Volvo Sensus Connect infotainment system
4 Telematics solution providers
4.1 Telematics service providers
4.1.1 Airbiquity
4.1.2 Atea
4.1.3 Beijing Yesway Information Technology
4.1.4 Connexis
4.1.5 Octo Telematics
4.1.6 SiriusXM Connected Vehicle Services
4.1.7 WirelessCar
4.2 Mobile operators
4.2.1 AT&T
4.2.2 Deutsche Telekom
4.2.3 Sprint
4.2.4 Telefónica Group
4.2.5 Verizon Communications and Verizon Telematics
4.2.6 Vodafone
5 Market forecasts and trends
5.1 Car telematics market forecasts
5.1.1 Car sales forecasts
5.1.2 Car telematics in the EU28 + EFTA and Eastern Europe
5.1.3 Car telematics in North America
5.1.4 Car telematics in Latin America
5.1.5 Car telematics in Asia-Pacific
5.1.6 Car telematics in the MiddleEast and Africa
5.1.7 Hardware and service revenue forecasts
5.2 Application trends
5.2.1 Mass market safety services driven by regional mandates
5.2.2 OEM SVT services compete with aftermarket services in many countries
5.2.3 Connected navigation faces competition from free smartphone apps
5.2.4 Cloud-based systems facilitate delivery of connected infotainment services
5.2.5 Remote control features become standard
5.2.6 CRM and vehicle diagnostics enable closer ties to end customers
5.2.7 Usage-based insurance to remain an aftermarket service in most countries
5.2.8 Privacy concerns may block satellite tracking from free smartphone apps
5.2.9 Wi-Fi hotspots enable convenient connectivity for passengers
5.3 Value chain analysis
5.3.1 Automotive suppliers
5.3.2 Telematics service providers
5.3.3 Car manufacturers
5.3.4 Telecom industry players
5.3.5 Software, application and content supplier
Glossary
Who should buy this report?

The Global Automotive OEM Telematics Market is the foremost source of information about the rapid adoption of car telematics. Whether you are a car manufacturer, telematics service provider, telecom operator, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

Related products
- Car Telematics in Europe
- Security Applications and Wireless M2M
- Fleet Management in the Americas
- The Global Wireless M2M market

Order form

TO RECEIVE YOUR COPY OF THE GLOBAL AUTOMOTIVE OEM TELEMATICS MARKET

You can place your order in the following alternative ways:
1. Place your order online in our web shop at www.berginsight.com
2. Fax this order sheet to us at fax number: +46 31 711 30 96
3. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
4. Email your order to: info@berginsight.com
5. Phone us at +46 31 711 30 91

Choose type of format
- Paper copy ................. 1200 EUR
- PDF 1-5 user license ........ 1800 EUR
- PDF corporate license ...... 3600 EUR

Family/Surname  Forename  Position  Company

Address  Country  Postcode

Telephone  FAX  Email

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer’s VAT Registration number below in order to avoid the addition of VAT.

Your PO number  Your VAT/TVA/IVA/BTW/MWST number

Please charge my credit card
- VISA  - Mastercard

Card number  Expiry date (MM/YY)  CV code

Cardholder’s name  Signature

Billing address

Postcode  Country

- We enclose our cheque payable to Berg Insight AB
- Please invoice me

Signature  Date

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB
Account number: 5011 10 402 80
BIC/SWIFT: ESSESESS
IBAN: SE92 5000 0000 0501 1104 0280

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

About the Authors

Johan Fagerberg is co-founder and an experienced analyst with a Master’s degree in Electrical Engineering from Chalmers University of Technology. He has during the past 19 years published numerous articles and reports about wireless M2M markets and location-based services.

André Malm is a senior analyst with a Masters degree from Chalmers University of Technology. He joined Berg Insight in 2006 and his areas of expertise include location-based services, personal navigation services and wireless M2M markets.

Berg Insight

About the Authors

Johan Fagerberg is co-founder and an experienced analyst with a Master’s degree in Electrical Engineering from Chalmers University of Technology. He has during the past 19 years published numerous articles and reports about wireless M2M markets and location-based services.

André Malm is a senior analyst with a Masters degree from Chalmers University of Technology. He joined Berg Insight in 2006 and his areas of expertise include location-based services, personal navigation services and wireless M2M markets.

Berg Insight